



FATCA (Foreign Account Tax Compliance Act)

Background

Due to United States legislation, since 1st July 2014, new policyholders are asked to confirm if they are a U.S. citizen or U.S. tax resident. There is a new question on our ePOS system and paper application forms for investment, savings and unit-linked, whole of life products.

Phase 2 of the legislation was implemented in December 2014 in respect of new policies where the proposers are not individuals e.g. company-proposed new business. Additional information will be required in such cases.

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